

## Guidelines for Using the Electronic Forms

Electronic versions of the forms (i.e., those that can be filled in on your computer) are provided in two versions of Microsoft Excel. If you have a later version of Excel, the forms should work correctly.

If you have difficulty in accessing or using the forms, please call Gordon Choy at 587-3438 or the eDivision at 587-1004.

### Set up

Before you start using the forms, save the forms to your PC. Click on File, Save As (select a location in your PC – usually C, My Documents) and, if you wish, enter a new File Name. If you get a message “enable macros?” click yes. If you get a message “read only?” click no. Close the master file on the Web before you begin work on your copy.

### Using the Forms

The forms consist of 7 worksheets contained within a single workbook. The worksheets are:

- Read Me First
  - Form A
  - Form B1
  - Form B2
  - Form B3
  - Form C-1
  - Form C-2
- } 3 copies of the same form

*Note: An additional copy of Form B (Performance Objectives) is now also available in Word format. See Form B – fillable Word version.*

To select a specific Excel form, click on the appropriate tab at the bottom of the worksheet.

(If you do not see tabs at the bottom of your worksheet, shrink the size of the visible Worksheet by dragging a corner toward the center and, if necessary, moving the worksheet up in the visible space by left click/hold on the blue border at the top and dragging the worksheet up and/or finding the up/down arrow on the bottom edge of the worksheet frame and pulling it down.).

Please select Read Me First, so that you are sure you are using the correct workbook and you follow the correct sequence in entering data so that all of the electronic calculations and transfers work properly (if you wish to print “Read Me First” as a ready reference while you work on the forms, simply click on File, Print, Print What? - Active Sheet, while it is open and visible).

### Entering Data On The Forms

- Work on the forms in the sequence specified in “Read Me First.”
- Follow the instructions at the top of each work sheet.
- The Worksheets have been locked, except for the cells in which data is to be entered, to avoid incorrect data entry and/or erasure of necessary formulas. Therefore you cannot expand spaces within the worksheet. If you need more space, use an attachment.
- To enter data, place your cursor on the space and click – you can then type your information in the space.

### Printing

**The worksheets are set to print only the form itself, and not the instructions visible at the top of your screen** (if you wish to print the on-screen instructions at the top of the form, place your cursor at the upper left corner, hold down the left mouse button, and move your cursor down to the end of the instructions. This will highlight the instructions. Go to File, Print, Print What, and click on Selection. Then click OK. This will print only the instructions.

**The forms are set to print in black and white** (if you have a color printer and wish to print in color, click on File, Print, Page Set Up, Sheet, Print and then click on Black and White to eliminate the check mark).